
Automatic Earnings Code Maintenance by Employee

PR-1018

Overview

The concept of 'Automatic Earnings Codes' (similar to Voluntary Deductions) has been added to Payroll. With this Extended Solution, a nearly unlimited number of earnings codes and the corresponding earning type (fixed or % of pay) can be set up and maintained for each employee. During payroll data entry or auto pay operations, this table of automatic earnings codes is drawn upon and the appropriate line items are added to the check.

Installation

Before installing this Extended Solution, please verify that the version level(s) printed on the CD label are the same as the version level(s) of the MAS 90 MAS 200 module(s) you are using. For further information, please see the Upgrades and Compatibility section below. Check your Shipping Manifest for a complete list of Extended Solutions shipped.

For detailed installation instructions, please refer to the Sage website at:

http://support.sagesoftwareonline.com/mas/extended_solutions/main.cfm

Installing Your Extended Solutions under Windows From a CD

If you have the *autorun* function turned on for your PC, the installation program will start up automatically. If not, find the **autorun.exe** file on your CD-ROM drive and double-click it to start the installation program. Follow the on-screen instructions.

From the Sage FTP site

When your Extended Solution is ready to be downloaded, you will receive an email from 'extendedsolutions.na@sage.com' telling you that it is ready. The email will contain the Customer Name, Cross Reference, a case-sensitive Password, a link via which you can download your Extended Solution, instructions, and a Shipping Manifest. If you have any problems with this order, please email extendedsolutions.na@sage.com and we will assist you during normal business hours.

Extended Solutions Control Center

Installing any Extended Solution will add an Extended Solutions Control Center to the MAS 90 MAS 200 Library Master Utilities menu. When you open the Control Center, the following options will be available:

- Extended Solutions Manuals
- Remove Extended Solutions
- Unlock Extended Solutions
- Merge Installation Files
- Extended Solutions Setup options

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Custom Office

If you customize your MAS 90 MAS 200, then you must run the Update Utility *every time* you install a Sage Software Extended Solution.

Setup

Once the disk is installed, you will need to access the Payroll Setup menu option screen. After the standard MAS 90 MAS 200 option screens have been displayed, a Setup screen for this Extended Solution will appear. Check the 'Enable Extended Solution' box to activate this Extended Solution (Figure 1). The manual for this Extended Solution, if it has been installed, can be viewed by clicking the 'Manual' button next to the 'Enable Extended Solution' check box. It can also be viewed via the Extended Solutions Control Center (see Installation, above).

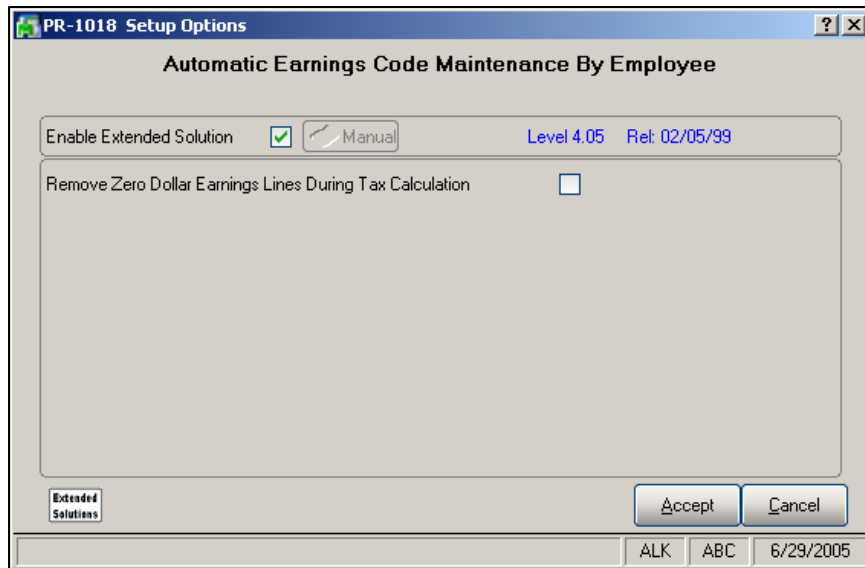


Figure 1

Answer the following prompt:

REMOVE ZERO DOLLAR EARNINGS LINES DURING TAX CALCULATION: If you check this box, any Earnings Codes line items with zero in the Extended Amount field will be removed during tax calculation.



If this Setup option is checked and all lines on a check are zero and the manual taxes box is unchecked, the entire check will be deleted during tax calculation.

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

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Operation

Employee Maintenance

A new 'Auto E.C.' button on the Employee Maintenance menu has been added for 'Automatic Earnings Setup' (Figure 2). From here a table of earnings codes can be entered and set up (Figure 3). Double-click on the line you want to maintain, or click the 'New' button to add a new Earnings Code (Figure 4). Each earnings code is set up and maintained as follows:

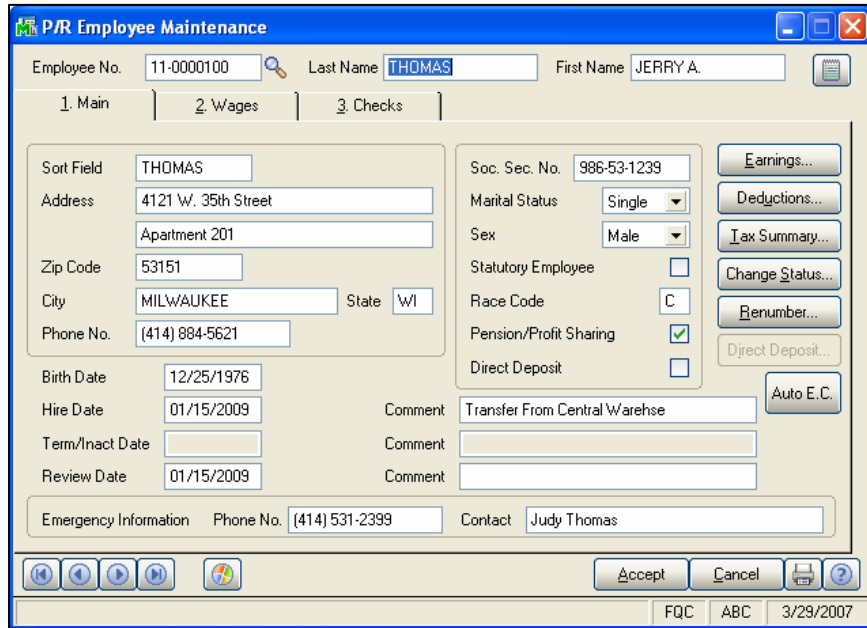


Figure 2

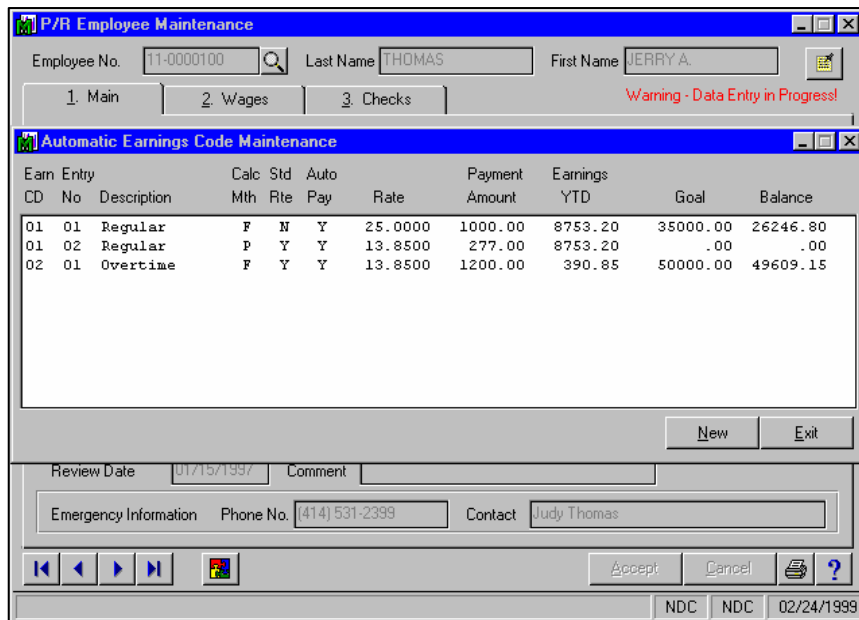


Figure 3

Automatic Earnings Code Maintenance

Earnings Code: 01 Regular Type: REGULAR
 Entry Number: 01 Calc: STANDARD

Automatic Earning	<input checked="" type="checkbox"/>	Earnings Goal	35000.00
Frequency	12345	Earned Month 1	4653.60
Department	21	Month 2	2216.00
Calculation Method	Fixed Amount	Month 3	.00
% Allocation	.000%	Q-T-D	6869.60
Standard Pay Rate	<input type="checkbox"/>	Y-T-D	8753.20
Pay Rate	25.0000	Balance	26246.80
Hours	40.00		
Pay Amount	1000.00		

Buttons: Accept, Cancel, Delete

Figure 4

EARNINGS CODE: Select an Earnings Code from those entered in Payroll Setup to be used during Auto Pay.

AUTOMATIC EARNING: Check this box to enable this earnings code to be added automatically to an employee's check. Un-checking this box excludes this Earnings Code from being used during Auto Pay for this employee.

FREQUENCY: Enter the Deduction Period(s) in which you want this earnings code to be active.

DEPARTMENT: Leave blank to allow the Department Code to default during Auto Pay. Entering a Department Code will override any default and use the same Payroll Department each time this entry is used

CALC METHOD: Select Fixed Amount or Percentage. The Fixed Amount will not allow the Standard Pay Rate (below) to be deselected. The Percentage Method will use calculate the Hours field using the Percentage entered and the standard hours for the pay period.

STANDARD PAY RATE: Check this box to use this employee's standard rate of pay. Leave it blank to override the employee's standard rate and use a different rate. This field is available only if Percentage Method is selected.

PAY RATE, HOURS, and PAY AMOUNT can all be used to calculate the desired Pay Rate, Hours, and Pay Amount. A manual change to any of these amounts will affect the other two

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as follows:

Pay Rate field	Hours field	Pay Amount field
manually changed	remain unchanged	recalculated
remain unchanged	manually changed	recalculated
recalculated	remain unchanged	manually changed

EARNINGS GOAL: A dollar amount goal can be specified. When amount paid for this earnings code entry reaches this amount, this earnings code entry will stop calculating. (See below for more details.)

The remaining fields are for display only and show monthly balances and year-to-date totals.

Payroll Data Entry

An employee's Automatic Earnings will be used in Auto Pay as well as in Selective Payment Entry only if a Standard Earnings Code is entered on the Payroll Cycle Data screen. It should be noted that 'Auto Pay' will now create pay entries only for employees who have Automatic Earnings defined, and the 'Earnings Codes to Automatically Apply' selection is disabled when this Extended Solution is enabled (Figure 5).

Figure 5

For each employee who is set up with Automatic Earnings Code entries, the system will draw on that employee's table of automatic earnings codes and the appropriate line items are added to the check.

The hours and amounts are calculated using the number of hours in the pay cycle and the percentage or fixed amount specified.

If a Goal has been established for the Earnings Code on the entry line, then this entry will be added during Auto Pay until the Goal has been reached or exceeded. If an Earnings Code is not referenced on more than one entry line for this employee, then during the last payroll in which the entry is used, a comparison will be made of the Entry Amount to the Goal; if the entry amount greater than the Goal, then the Auto Pay entry will be adjusted automatically to the difference between the two. If the same Earnings Code is referenced on more than

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one entry, and there are Goals established, then the system applies the *Earnings Code's YTD amount* to each entry in Automatic Earnings Code Maintenance. The last entry will NOT adjust the Auto Pay amount to be the difference between the Pay Amount and the Goal.

The entries can be deleted or modified as necessary during payroll data entry without affecting the masterfile setup.

Tax Calculation

If you checked the 'Remove Zero Dollar Earnings Lines During Tax Calculation' box in Setup, any Earnings Codes line items with zero in the Extended Amount field will be removed during tax calculation.

Reporting

The Automatic Earnings Code setup is printed as part of the employee listing following the other earnings data.

Period End Processing

Automatic Earnings records will be deleted whenever an Employee's files are deleted during Period End Processing.

Direct Deposit Stubs

The form field 'Earnings Code Goal' has been added to direct deposit stubs. This form field will print the earnings goal set up for the first occurrence of an Earnings Code in the Auto Earnings Code File. See Forms, below.

Forms***Non-Graphical Forms***

You can maintain the new form fields for this Extended Solution by clicking the 'Form...' button. A window will pop up where you may select the form you would like to maintain (Figure 6). Select this Extended Solution to display the Form Maintenance screen (Figure 7).

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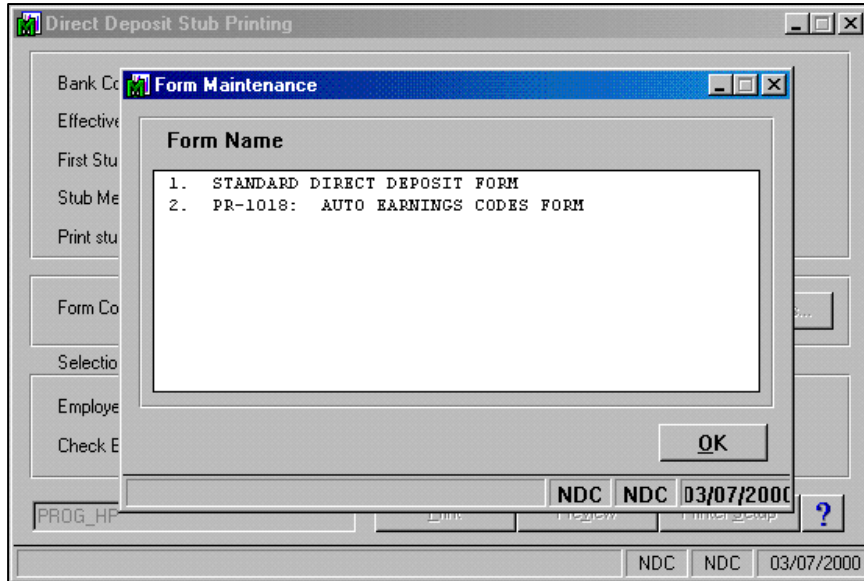


Figure 6

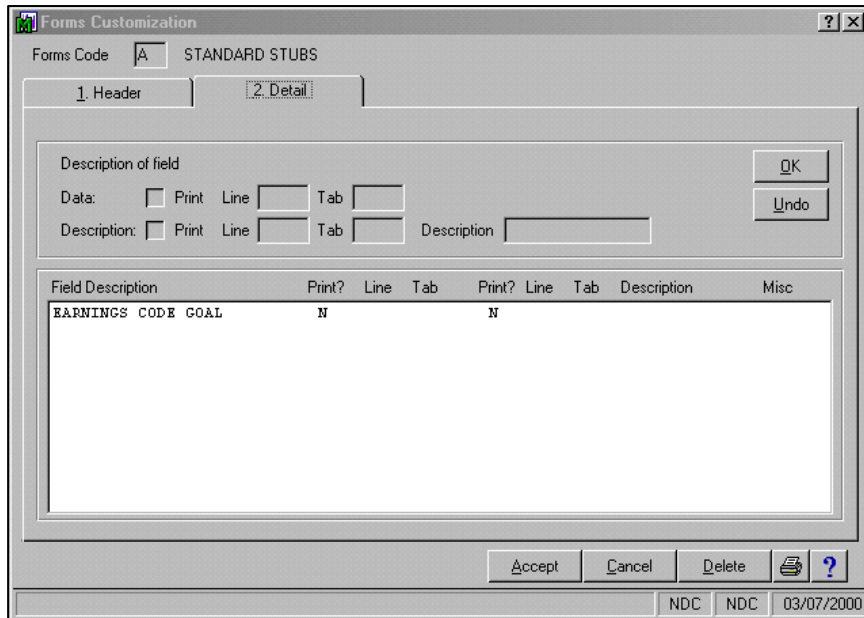


Figure 7

The new fields that you activate with this Extended Solution will print in addition to any other fields that have been activated in standard MAS 90 MAS 200 or other Sage Software Extended Solution FORM maintenance.

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Parts of this document may refer to the *Specific Purpose Rule*. When referenced, the described feature was developed for a specific client to its specifications and may not conform to generally accepted MAS 90 MAS 200 standards and procedures. These features may or may not benefit you in your application of MAS 90 MAS 200.

Acknowledgments

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